



BI Save As Instructions

BI “Save As” feature

The “Save As” feature shall provide the ability of saving the users current navigational state of a report, including filters, settings and drill down steps so that the user can produce the same report layout repeatedly without having to manually perform each step each time.

INSTRUCTIONS: Use the “Save As” feature in BI to save formatted BI reports. Once a BI report is set up for a user’s needs, he/she can save it and retrieve it again later to re-run for updated data. Or he/she can access the original report to filter further and run it for another set of parameters, saving it under a new file name.

Steps

1 Activate the “Save As” feature. (Activation of this feature is required once upon initial use.)

- Click on the My Documents Tab.



- This will activate the “Save As” feature.
- Later this tab will be used to retrieve saved reports (see Step 4).

2 Create a report.

- Select the Reports Tab.



- Select a report, run it and make any adjustments by removing or adding data elements or by setting filters.



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3	Save your Report.
	<ul style="list-style-type: none">Click on the “Save As” button located in upper left corner of the report. <div data-bbox="235 655 548 833"><p>B0068: Labor Report</p><p>Save As... Display A</p></div> <ul style="list-style-type: none">Choose the “My Portfolio” tab.If the dialog box DOES NOT contain the My Portfolio tab. Please go back and complete Step 1.



BI Save As Instructions

Favorites BEx Portfolio **My Portfolio**

Description ▾

- 12/15/2009 post HR SP upgrade
- 12-15-09 test

Description

OK Cancel

- Type the name of the report in the box at the bottom of the screen marked "Description."
- Click OK.

When this feature is available in Production, BEACON will provide suggested naming conventions that will allow users control and access their "Saved As" reports.



BI Save As Instructions

- Select "My Documents" from the BI Home Page.
- Click on the report name.

My Documents

Name		Modified	Modified By
B0068: Labor Report 02-04-2010	Rename Delete	2/4/10 7:44:16 AM	McCULLOUGH, PHATE

- The BI report that you saved (in step 3) is then displayed in a new browser window. The data is the same data retrieved when the report was last saved.
- Filter the report, and run it again to update the data or run it for another position or employee.
- **IMPORTANT NOTE:** Be sure to save the new report with a different name if the intent is to retain the original report in the My Documents listing. Otherwise, the original will be overwritten.

5 Rename your saved Report.

- Select "My Documents" from the BI Home Page
- Click on the Rename link next to the report.


My Documents

Name		Modified	Modified By
B0068: Labor Report 02-04-2010	Rename Delete	2/4/10 7:44:16 AM	McCULLOUGH, PHATE

- Enter the new report Name in the New Name area and click Save.


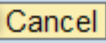


BI Save As Instructions

 **B0068: Labor Report 02-04-2010 - Rename**


New Name: *

Description:

- A confirmation message will appear at the top of the page

My Documents


 Item "B0068: Labor Report 02/04/2010" has been updated

Name		Modified	Modified By
B0068: Labor Report 02/04/2010	Rename Delete	2/4/10 7:49:26 AM	McCULLOUGH, PHATE

6 Delete a saved Report

- Select "My Documents" from the BI Home Page
- Click on the Delete link next to the report

My Documents

Name		Modified	Modified By
B0068: Labor Report 02/04/2010	Rename 	2/4/10 7:49:26 AM	McCULLOUGH, PHATE

- Click 'Yes' to confirm deletion



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	<div>Confirm Deletion</div> <div>Are you sure you want to delete the item "B0068: Labor Report 02/04/2010"?</div> <div><input type="button" value="Yes"/> <input type="button" value="No"/></div> <div><ul style="list-style-type: none">A confirmation message will appear at the top of the page. If there is more than one report, the count at the bottom of the screen will also update.</div> <div><div> Item "B0068: Labor Report 02/04/2010" has been deleted</div></div>
7	<div>Refresh the My Documents tab</div> <div><ul style="list-style-type: none">Click on the small button in the upper right corner. This will open a context menu.Select Refresh. This will refresh the display to show the most recent changes.</div> <div><div><div>My Documents</div><div>RTFOLIO</div><div>folio</div></div><div><div><div>6-08-09 another test</div><div>Rename Delete</div></div><div><div>Modified</div><div>6/8/09 12:13:10 PM</div></div><div><div>Modified By</div><div></div></div></div><div><div>Open in New Window</div><div>Refresh</div><div>Details</div></div></div>